

FERMI NATIONAL ACCELERATOR LABORATORY

# Designer Training Manual

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## SharePoint 2010

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This training manual provides information and hands-on examples for how to use the Fermilab instance of SharePoint for those with Design-level site permissions, including: creating lists, document libraries and creating and editing pages.

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DRAFT

## i. Useful Resources

| Online Help Resources from Fermilab  |   |
|--------------------------------------|---|
| Integration environment              | <a href="https://intranet-int.fnal.gov/">https://intranet-int.fnal.gov/</a>   |
| Help site                            | <a href="https://sharepoint.fnal.gov/help/Pages/HelpHome.aspx">https://sharepoint.fnal.gov/help/Pages/HelpHome.aspx</a>   |
| Help Blog                            | <a href="https://sharepoint.fnal.gov/help/HelpBlog/default.aspx">https://sharepoint.fnal.gov/help/HelpBlog/default.aspx</a>   |
| SharePoint books at the FNAL library | <a href="https://sharepoint.fnal.gov/help/Lists/Books%20About%20SharePoint%202010/AllItems.aspx">https://sharepoint.fnal.gov/help/Lists/Books%20About%20SharePoint%202010/AllItems.aspx</a>   |
| Online access to this user Manual    | <a href="https://sharepoint.fnal.gov/cd/sites/com/SharePointCOM/Training%20Manuals/Fermilab%20SharePoint%202010%20Site%20Owner%20Training%20Manual.docx">https://sharepoint.fnal.gov/cd/sites/com/SharePointCOM/Training%20Manuals/Fermilab%20SharePoint%202010%20Site%20Owner%20Training%20Manual.docx</a> |

| Online Help Resources from Microsoft:     |   |
|---|---|
| Download Office 2010 Training- SharePoint | <a href="http://office.microsoft.com/serverhelp/helpcategory14.aspx?CategoryID=CH010372432&amp;lcid=1033&amp;products=WSENDUSER&amp;CTT=4">http://office.microsoft.com/serverhelp/helpcategory14.aspx?CategoryID=CH010372432&amp;lcid=1033&amp;products=WSENDUSER&amp;CTT=4</a>   |
| Online tutorials                          | <a href="http://office.microsoft.com/en-us/support/results.aspx?filter=3&amp;qu=training&amp;av=osu140&amp;queryid=485363f5%2D805%2D417f%2D8642%2Daec50a9d1d46">http://office.microsoft.com/en-us/support/results.aspx?filter=3&amp;qu=training&amp;av=osu140&amp;queryid=485363f5%2D805%2D417f%2D8642%2Daec50a9d1d46</a> |
| “That’s why I use SharePoint” site        | <a href="http://download.microsoft.com/download/d/4/2/d4290c8a-5563-44a7-96a6-9fe77eff40b0/qrc_all.pdf">http://download.microsoft.com/download/d/4/2/d4290c8a-5563-44a7-96a6-9fe77eff40b0/qrc_all.pdf</a>   |

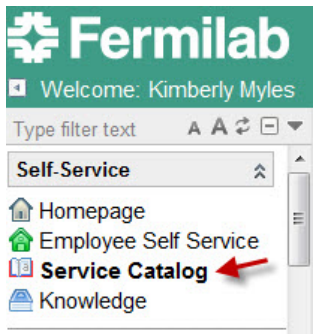
| References for this User Manual |   |
|---------------------------------|---|
| 1.                              | Microsoft SharePoint 2010 Plain & Simple, by Jonathan Lightfoot and Chris Beckett.  |
| 2.                              | SharePoint 2010 How-To, by Ishai Sagi.  |
| 3.                              | Microsoft SharePoint 2010 for Dummies, by Vanessa L. Williams.  |
| 4.                              | The SharePoint Shepherd’s Guide for End Users, by Robert L. Bogue.  |
| 5.                              | Beginning SharePoint 2010: Building Business Solutions with SharePoint, by Amanda Perran, Shane Perran, Jennifer Mason, and Laura Rogers. |

## ii. Additional training opportunities

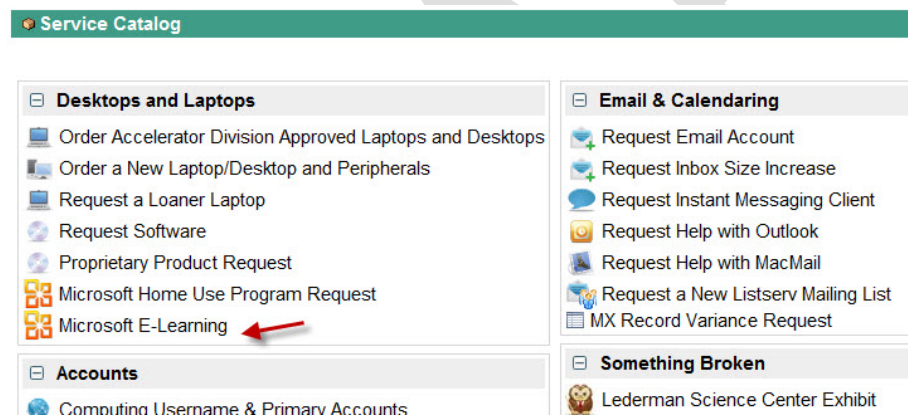
### a. SharePoint computer-based training for Employees

Fermilab employees can request online, Computer-based SharePoint training through the Fermilab Service Desk:

1. Login to the Service Desk. From the “Self-Service” area, select “Service Catalog”.



2. From the “Desktops and Laptops” area, select “Microsoft E-Learning”



3. A page appears providing more detail on how to register and a link to what courses are available.

### b. Learning Tree

Learning Tree offers a series of SharePoint classes suitable for all levels of users.

List of SharePoint classes offered by learning tree:

<http://www.learningtree.com/training-directory/sharepoint-training-6.htm>

Please consult your manager or supervisor to determine if you can attend one of these classes.

## Introduction

This user guide seeks to highlight best practices and suggestions for the actions a SharePoint Designer can take to design, update and maintain a SharePoint site. Each SharePoint site collection has one or more designers assigned to it. Site Designer responsibilities include:

- Creating, editing and deleting lists and libraries
- Making design changes to the Shared View for the site
- Applying themes, styles and modifying pages

## 1. Working with team sites

The standard SharePoint site for departments, groups and any other organization at Fermilab is a team site. A team site is a collection of “wiki” web pages. SharePoint wikis are designed to make it easy to publish content. Wiki pages contain rich content, such as text, tables, links, and images.

By default, team sites have a shared document library, lists (including a calendar and tasks), and a team discussion board. Designers can also add Web Parts to their team sites.



**Tip:** Wikis derive their name from the Hawaiian word for “quick”.

### 1.1 Create a My Site Team Site for production testing purposes

Anyone with a Services Account and password can create a My Site team site sub-site for use as a production sandbox to test basic SharePoint features covered in training.

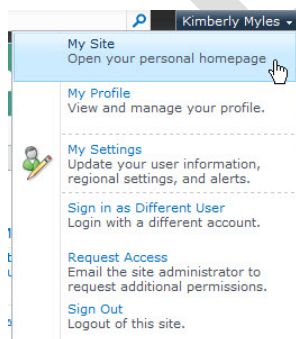


**NOTE:** For more complex testing, please test in the integration environment:

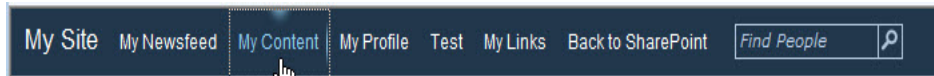
<https://intranet-int.fnal.gov/Pages/Default.aspx>

#### 1.1.1. To create a My Site team sub-site ~~insite in~~ production:

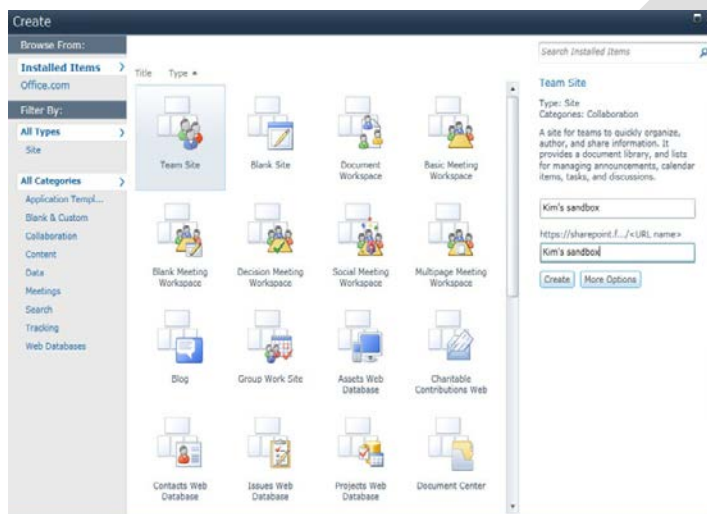
1. In the upper right hand corner of any page, click the link for your name.
2. Select "My site" from the dropdown menu.



3. From the My Site page that appears, select "My Content" from the top menu.



4. From the team site page that appears (with your name as title), select "Site Actions" and then "New Site."
5. In the create menu that appears, select the Team Site template.
6. Add a title such as "Kim's sandbox" and name the URL (which can be the same as the title).
7. Click "Create" to create your new sandbox team site collection.



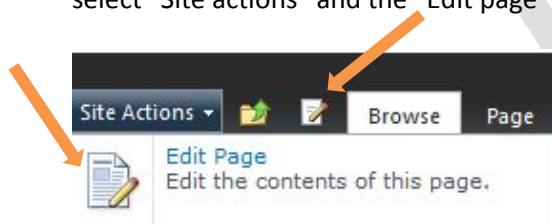
## 1.2 Design and Edit a team site

As Designer, you can change the title and default image on the landing page to make it easier to identify your site with your department, group or organization.



### 1.2.1 To edit a page title:

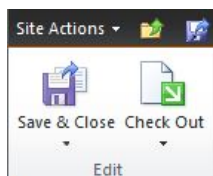
1. To edit a page, select the paper and pencil icon from the top menu to enter edit mode. (You can also select "Site actions" and the "Edit page" button).



2. Select the "Format Text" tab from the "Editing Tools" menu to access editing options (including font, font color, font size, text layout, markup styles and styles).

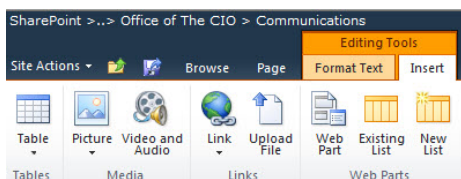


3. Click the Save icon from the top menu or the Save & Close icon from the Ribbon to save changes.



### 1.2.2 To insert a picture, table, link or Web-part:

- 1) From the Insert tab, you can add a picture to your page or a table, link, list or Web Part by selecting the icon for that item.

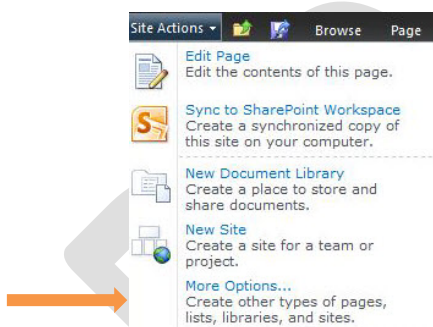


NOTE: Please do not cut and paste content into a wiki page from any sources outside of SharePoint. This can cause formatting issues and freeze the page. Instead, please cut and paste content into a text editor such as Notepad for Windows or Text Edit for Mac first and then paste content into SharePoint.

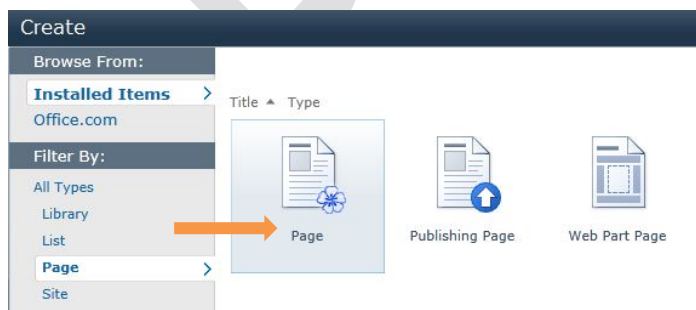
## 2. Working with Pages

### 2.1 Create a new page

1. From the Site Actions menu, select “More Options...”



2. From the left quick launch menu, in the Filter By area, select “Library.”
3. Select the “Page” icon.



4. Type a name for your page in the Name field and click “Create” to publish the page.

#### Page

Type: Page

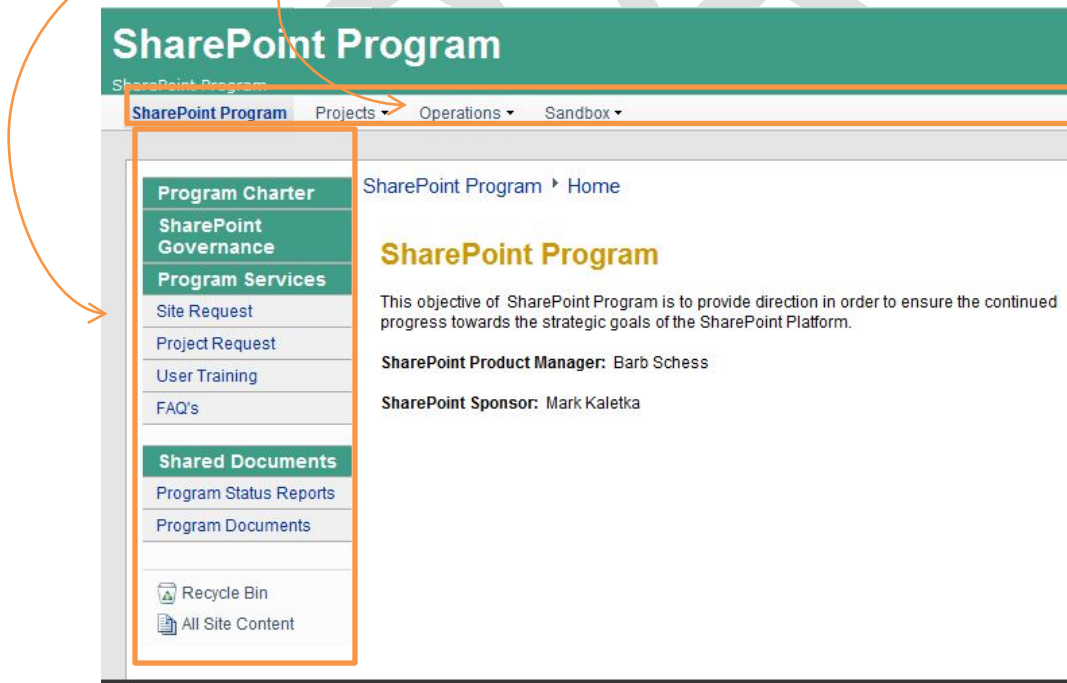
Categories: Content, Blank & Custom

A page which can be easily edited in the web browser using Web Edit. Pages can contain text, images, and wiki links, as well as lists and other web parts. Pages are useful for collaborating on small projects.

### 3. Managing navigation

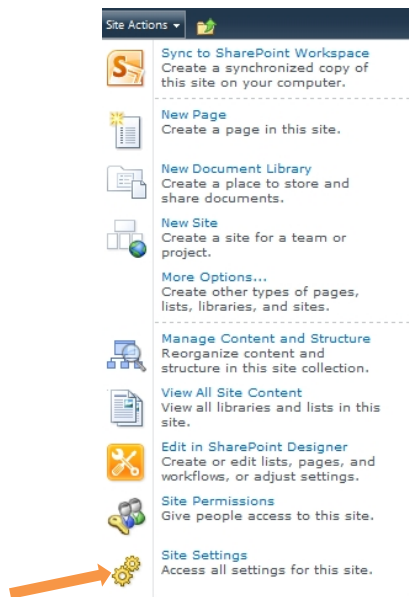
Within each site and site collection, you have the ability to control navigation. Navigation includes two regions on the page:

- The **top navigation** menu which is also called the **Global** navigation area.
- The **left navigation** menu which is also called the **Current** navigation area.

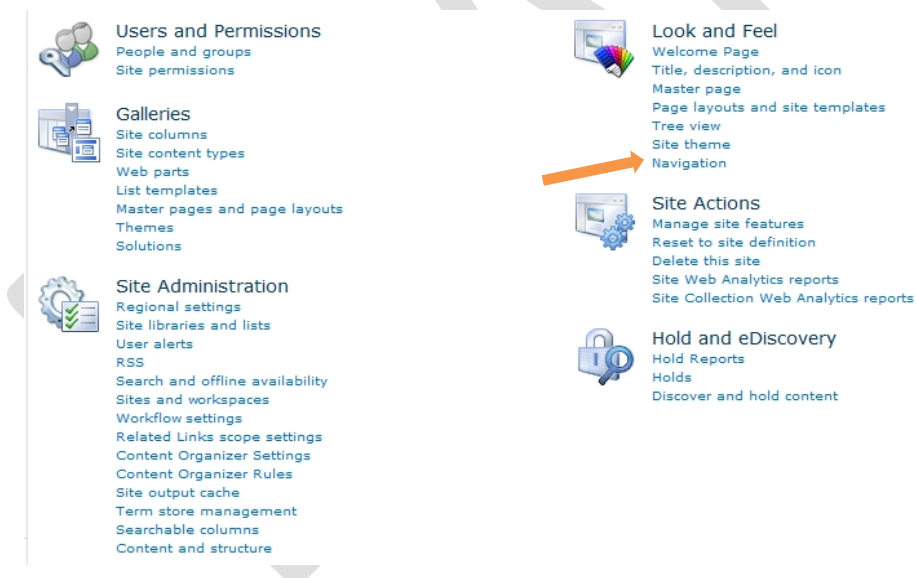


### 3.1 Modify the left navigation bar

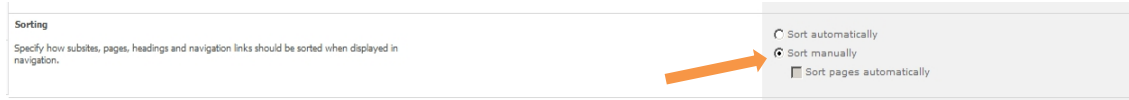
1. From the Site Actions menu, click “Site Settings.”



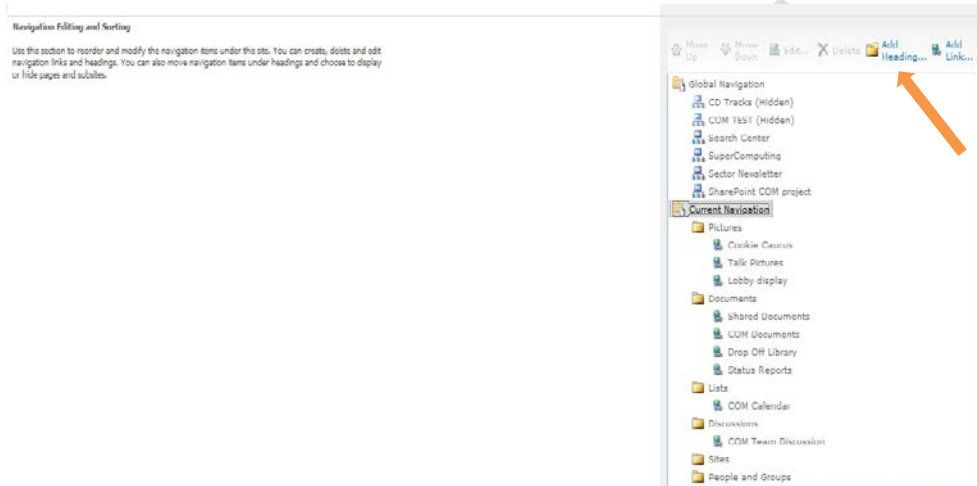
2. From the Site Settings page, in the “Look And Feel” area, select “Navigation.”



- From the Navigation Settings page that appears, in the “Sorting” section, select the “Sort manually” option.



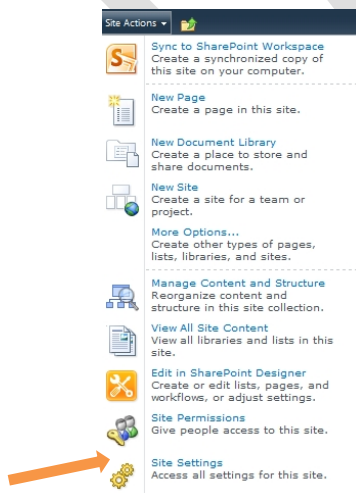
- From the navigation Editing and Sorting section, select the Current Navigation folder and click “Add Heading...” or “Add Link...”



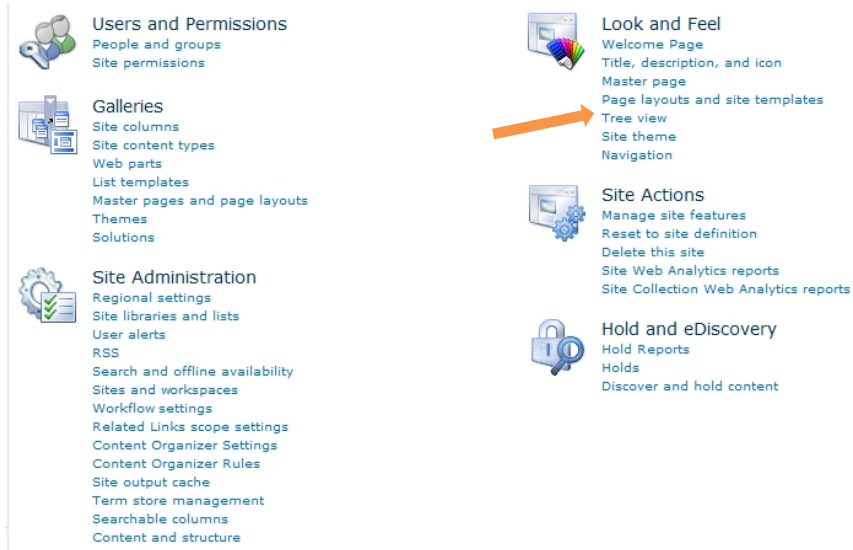
- Add content and click “OK.”
- Click the new heading or link to select it. Then click “Move Up” or “Move Down” until the menu item is listed in the order you desire.
- Click “OK.”

## 3.2 Modify the top navigation bar

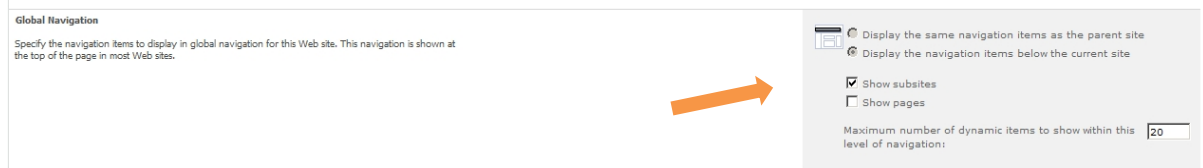
- From the Site Action menu, select “Site Settings.”



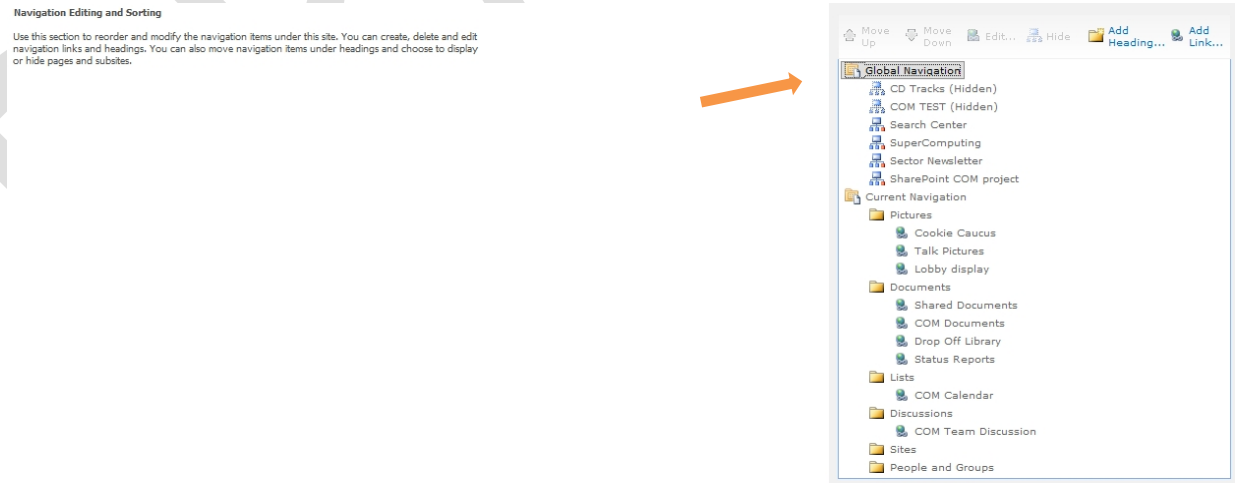
2. From the Site Settings page, in the Look and Feel area, select "Navigation."



3. In the Global Navigation section, select the option to "Show sub-sites."



4. In the Navigation Editing and Sorting section, select the "Global Navigation" folder.



5. You have the option to add a heading, a link or hide a site.
6. Click "OK" to accept your changes.

## 4. Working with Document Libraries

A Document Library is a special kind of List. Document Libraries allow you to manage files such as documents, spreadsheets, and presentations by adding them to a central location.

You can have one or many Document Libraries, and each Document Library can contain a hierarchy of folders and files.

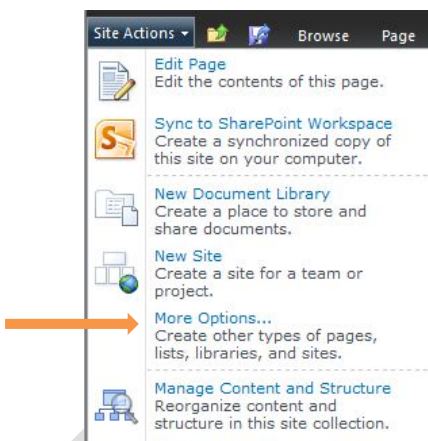


**NOTE:** the best practice recommendation is NOT to have too many folders or sub-folders within a Document Library. For ease of navigation, create multiple Document Libraries instead.

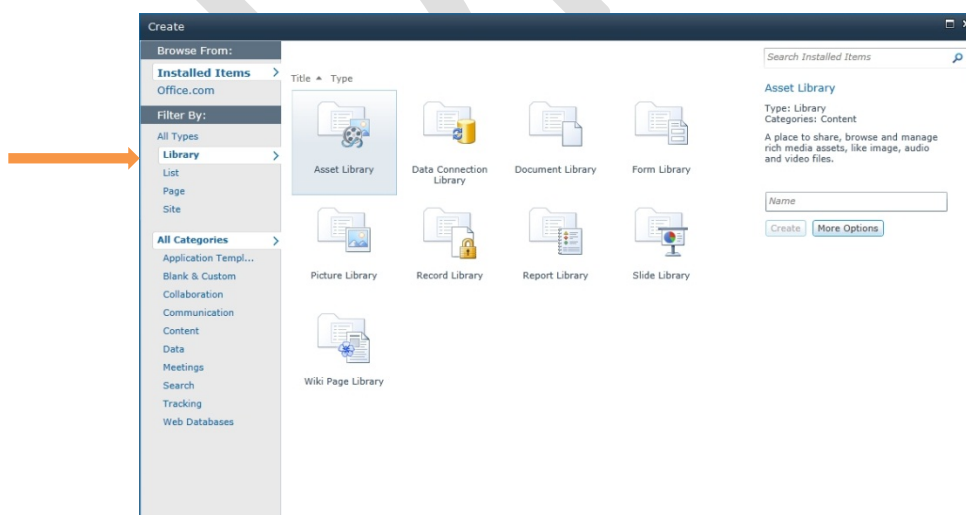
Each team site comes with a default Document Library named “Shared Documents”. You can additional Document Libraries.

### 4.1 Create a Document Library

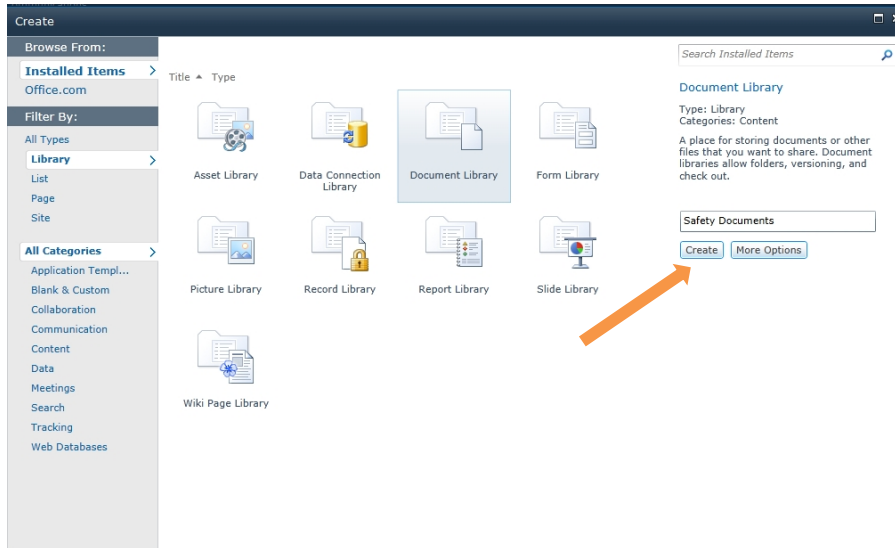
1. From the Site Actions menu, Click “More Options...”



2. From the Create page that appears, from the Filter By” area, choose “Library.”



3. Select the “Document Library” icon.
4. Enter a name for the Document Library and then click “Create.”



A link to your new document library will automatically appear on the left menu under the Library heading.

## 4.2 Grant access to a Library

1. Select the library you want to work with.
2. Under Library Tools on the Ribbon, select the “Library” tab.
3. Click “Library Permissions.”

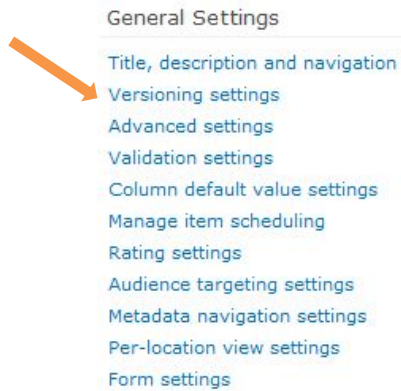


4. Click “Grant Permissions.”
5. Type the person’s name in the Users/Group box.
6. Add the user to a permissions group.
7. Click “OK.”

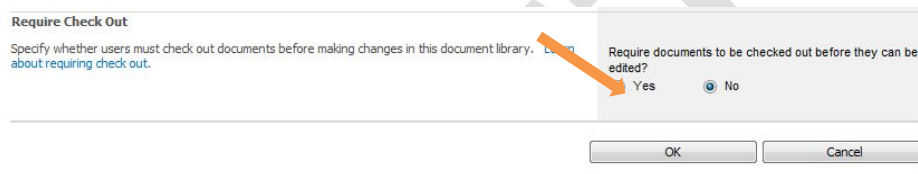
## 4.3 Require check-out of files

You can set up a document library so that users must check out files before they can update them.

1. From the Library Tools menu, select “Library Settings.”
2. From the Document Library Settings page that appears, in the “General Settings” area, select “Versioning settings.”



- From the “Versioning Settings” form that appears, in the “Require Check Out” area, select “Yes.”

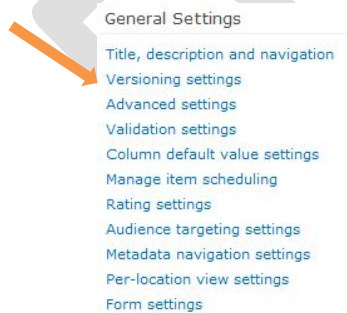


- Click “OK.”

The next time a user tries to open a file, a check out will be required.

#### 4.4 Enable versioning for a library

- From the Library Tools menu, select the Library tab.
- From the Library tab, select the “Library Settings” icon.
- From the Document Library Settings page that appears, in the “General Settings” area, select “Versioning settings.”



- From the Versioning Settings form that appears, enable your preferred settings.
    - In the Document Version History area, select the setting to “Create major versions” or “Create major and minor (draft) versions.”
    - You can also “Optionally limit the number of versions to retain” by entering a number in this field.
- Click “OK” to enable versioning for the library.

|   |   |
|---|---|
| <b>Content Approval</b><br>Specify whether new items or changes to existing items should remain in a draft state until they have been approved. <a href="#">Learn about requiring approval.</a>   | <b>Require content approval for submitted items?</b><br><input type="radio"/> Yes <input checked="" type="radio"/> No   |
| <b>Document Version History</b><br>Specify whether a version is created each time you edit a file in this document library. <a href="#">Learn about versions.</a>   | <b>Create a version each time you edit a file in this document library?</b><br><input checked="" type="radio"/> No versioning<br><input type="radio"/> Create major versions<br>Example: 1, 2, 3, 4<br><input type="radio"/> Create major and minor (draft) versions<br>Example: 1.0, 1.1, 1.2, 2.0<br><br><b>Optionally limit the number of versions to retain:</b><br><input type="checkbox"/> Keep the following number of major versions: <input type="text"/><br><input type="checkbox"/> Keep drafts for the following number of major versions: <input type="text"/> |
| <b>Draft Item Security</b><br>Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. <a href="#">Learn about specifying who can view and edit drafts.</a> | <b>Who should see draft items in this document library?</b><br><input checked="" type="radio"/> Any user who can read items<br><input type="radio"/> Only users who can edit items<br><input type="radio"/> Only users who can approve items (and the author of the item)   |
| <b>Require Check Out</b><br>Specify whether users must check out documents before making changes in this document library. <a href="#">Learn about requiring check out.</a>   | <b>Require documents to be checked out before they can be edited?</b><br><input type="radio"/> Yes <input checked="" type="radio"/> No  |

## 5. Working with Lists

SharePoint 2010 provides many kinds of Lists that you can use to track information. A List is similar to an Excel spreadsheet or a table in a database.

In a List, data is gathered in rows, and each row is known as a List Item. A List can have multiple columns. A List Item is a row with data in those columns.

For example, a task list may have the following columns: Type, Title, Assigned To, Status, Priority, Due Date and %Complete.

| <input type="checkbox"/> | Type            | Title | Assigned To    | Status      | Priority   | Due Date  | % Complete |
|--------------------------|-----------------|-------|----------------|-------------|------------|-----------|------------|
|                          | SharePoint task | NEW   | Kimberly Myles | In Progress | (2) Normal | 3/28/2013 | 75 %       |

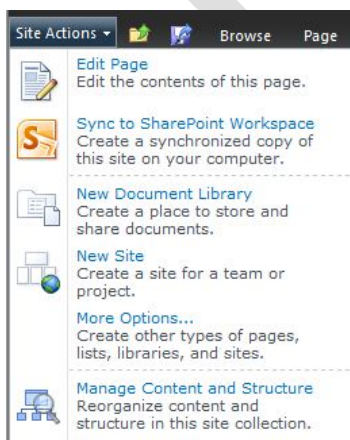
SharePoint provides three basic kinds of Lists:

1. **Communication Lists** are used to track announcements, contacts, and discussion boards.
2. **Tracking Lists** are used to track information such as links, calendars, tasks, issues, and surveys.
3. **Custom Lists** provide a starting template that you can the columns you need to.

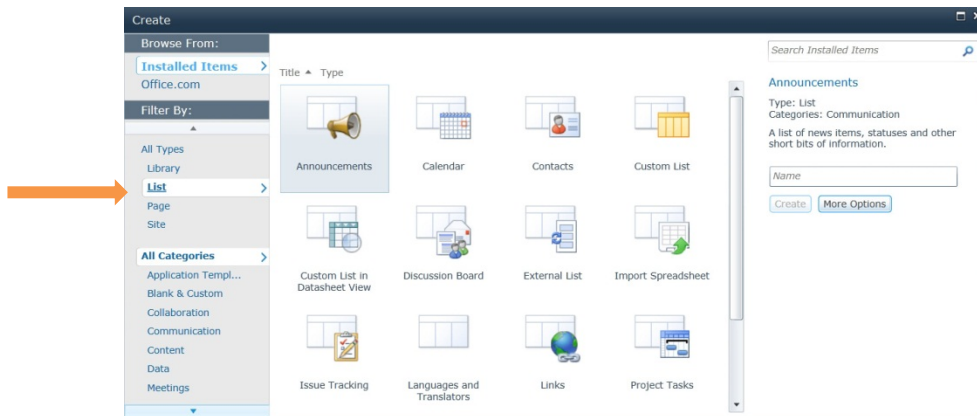
| Types of List                   | When to use it  | What makes it special  |
|---------------------------------|---|--|
| Announcements                   | To display brief announcements on your site's home page                       | You can enter expiration dates for announcements   |
| Contacts                        | To track contacts, especially if you want to use Outlook for data entry       | You can remove columns that you don't need   |
| Discussion boards               | To create a discussion forum where people can post messages and reply to them |  |
| Links                           | To track hyperlinks   | Uses a hyperlink column that automatically formats entered text as HTML anchor links   |
| Calendar                        | To track calendar items   | Can synchronize with Outlook and knows how to handle recurring events  |
| Tasks                           | To track tasks  | Can synchronize with Outlook; Task Lists can be grouped with summary tasks   |
| Project tasks                   | To track work items for a project.  | Can display as a Gantt chart   |
| Issue Tracking                  | To track trouble tickets.   | Works well with issues that have three states – open, closed, and resolved   |
| Survey                          | To take a poll  | Allows you to create a set of questions that users must walk through   |
| Custom                          | To create a List with columns that you define.                                | Allows you to create a List specific to your content and can for example act on certain content in special ways                                      |
| KPI (Key Performance Indicator) | To display graphical status indicators.                                       | Allows you evaluate selected business data against specified goals and display that information in various formats such as scorecards and dashboards |
| Import Spreadsheet              | To create a List based on an existing spreadsheet.                            | Allows you use an existing Excel spreadsheet as the basis of the List; can help avoid rework and repeated effort entering data                       |
| External                        | To create a List based on a data source outside SharePoint.                   | Allows you display data from other non-SharePoint databases or Web services  |

## 5.1 Create a List

1. From the Site Actions menu, select “More Options...”



2. On the Create page, from the “Filter By” area, select “List.”



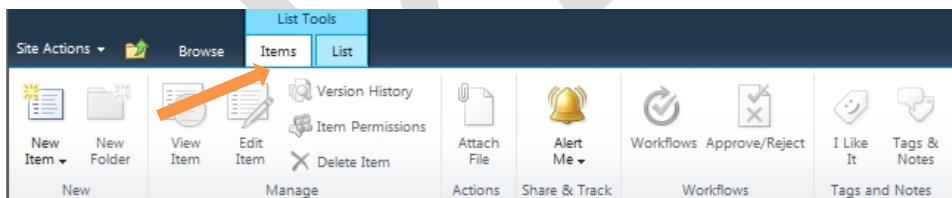
3. Click the icon for the kind of List you want to create.
4. Type a name for your List and click “Create.”

## 5.2 Manage a List

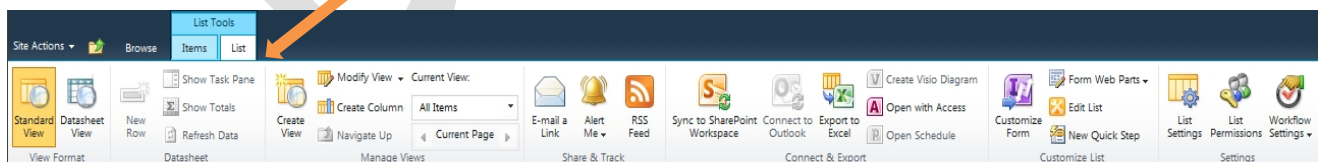
All SharePoint Lists display the Ribbon at the top of the List. You can use the Ribbon to access the features that will enable you to update the look, feel and content of your list.

The menu commands you see in the Ribbon depend on the kind of List you are viewing. The Ribbon usually displays List commands in one of two tabs:

**The Items tab** displays all of the commands you need for working with items.

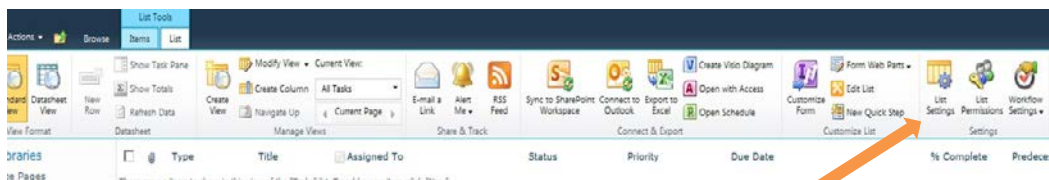


**The List tab** displays all of the commands for managing and customizing the entire List, such as creating views and exporting the List to Excel.

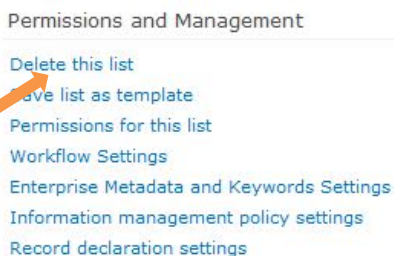


### 5.3 Delete a List

1. Select the List you want to delete.
2. From the List tab, click “List Settings.”



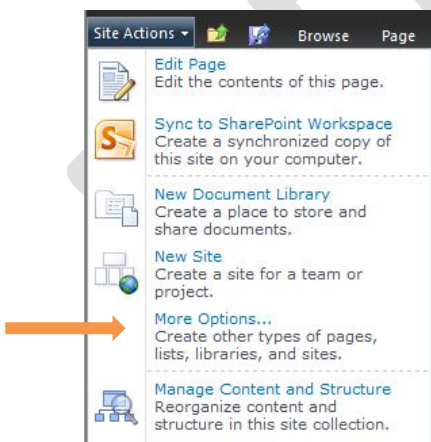
3. From the list settings page, in the Permissions and Management area, click “Delete This List.”



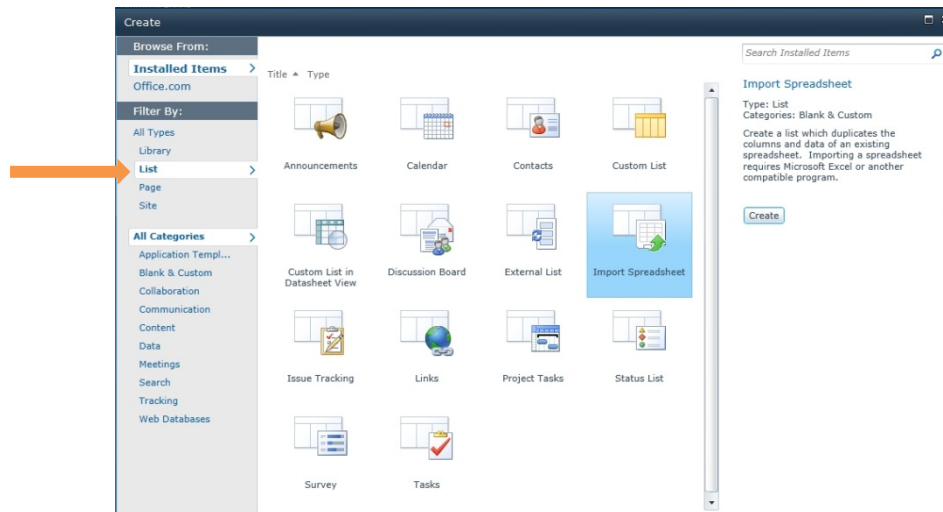
4. Click “OK.”

### 5.4 Import a spreadsheet to create a List

1. From the Site Actions menu, select “More Options...”



2. On the Create page, from the “List Filter” area, select “List.”

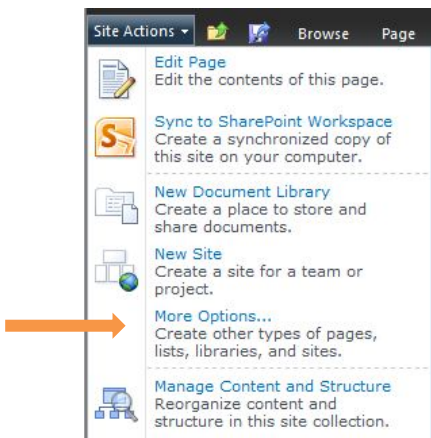


3. Click the “Import Spreadsheet” icon, and then click “Create.”
4. Fill out the Name for your list and click “Browse” to select the spreadsheet to import.

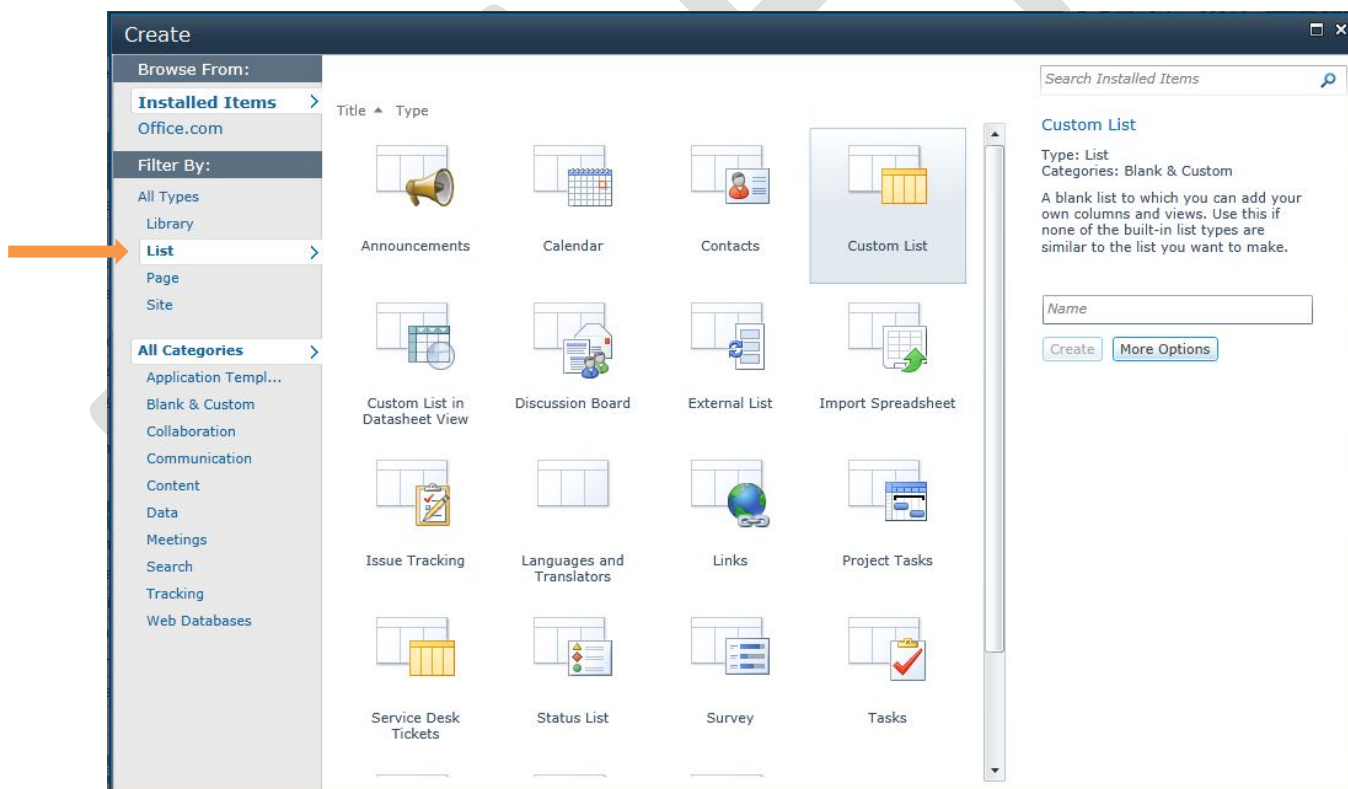
5. Make your selection and click “Open” to select the spreadsheet.
6. Click “Import” to import the spreadsheet into a SharePoint list.

## 5.4 Create a Custom List

1. From the Site Actions menu, select “More Options...”



2. On the Create page, from the “Filter By” area, select “List”.
3. Select the “Custom List” icon.

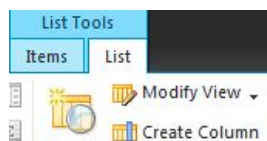


4. Name your list and click “Create.”

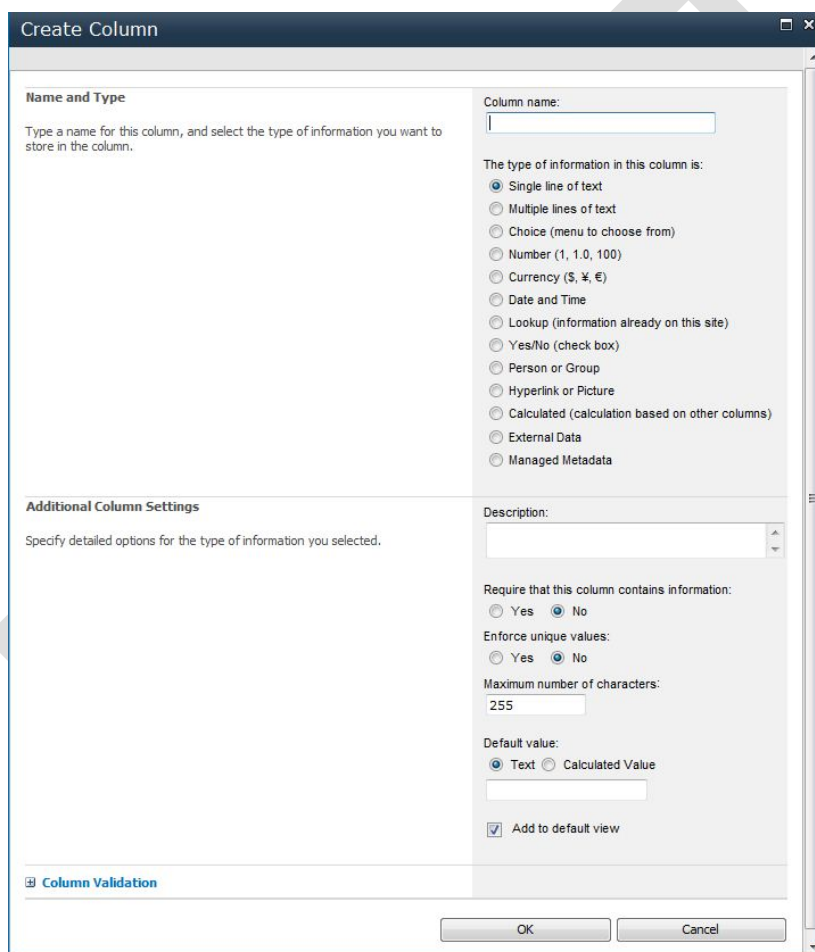
You can customize your list further by adding columns. You can add columns from the list menu or the List settings menu.

### 5.4.1 Add a column from the List Menu:

1. From the List menu, select “Create Column.”



2. From the “Create Column” form that appears, name your column and select the type of information that will appear in this column such as single lines of text, date and time, or a choice column which allows you to create drop-down, check box or radio button items to select from or a calculated column.

A screenshot of the 'Create Column' dialog box. The dialog is divided into two main sections: 'Name and Type' and 'Additional Column Settings'. In the 'Name and Type' section, there is a text box for 'Column name:' and a list of options for 'The type of information in this column is:'. The 'Single line of text' option is selected. In the 'Additional Column Settings' section, there is a text box for 'Description:', a section for 'Require that this column contains information:' with 'No' selected, a section for 'Enforce unique values:' with 'No' selected, a 'Maximum number of characters:' field set to 255, a 'Default value:' section with 'Text' selected, and a checkbox for 'Add to default view' which is checked. At the bottom, there are 'OK' and 'Cancel' buttons.

3. Make your selections and click “OK” to create your column.

### 5.4.2 Add a column from the List Settings menu

1. From the Ribbon, select the List Settings button.
2. From the List Settings page that appears, in the “Columns” area, choose the option to “Create a Column.”

## 5.5 Working with Calculated Columns

You can use the calculated column feature to display information based on automatic calculations that you determine and that SharePoint performs. Most of the available calculations are similar to Microsoft Excel “functions and syntax.” If you are familiar with Excel, then you should be able to create a formula for a calculated column.

Calculated columns can be used to automatically generate data. Some scenarios include:

- Calculating the difference between two time periods- i.e. the number of days from project commencement to completion.
- Finding out the weighted average of 2 columns
- Concatenate data i.e. display a full name by adding first, middle and last name columns
- Showing time without the date from a date and time column

### 5.5.1 Procedure to insert a calculated column into a SharePoint List

In order to use the calculated column feature, you must first insert a calculated column into your SharePoint list.

1. Navigate to the list that you want to work with.
2. From the List tools menu, select the “List” tab and from the ribbon, select “Create Column.”
3. In the “Create Column” form that appears, add the following:
  - Add a name for your column.
  - For the Name and Type option, choose “Calculated.”
  - In the Additional Column Settings area in the “Formula” field, add an “=” sign and then choose the columns that you want to work with from the “Insert Column” field and click “Add to formula” to add them to the formula field.
  - Once the columns appear in the formula field, update the formula field with the formula syntax that you want to use. (For example, you could add a “+” sign between the two columns if you wanted to add them or a “-” to subtract the difference between the two columns.)
  - For the “data type returned from this formula is” field, select the format you want the results to appear in from the following options: single line of text, number, currency, date and time, or yes/no response.
4. Click “OK” to save your changes and create the calculated column.

## Example formulas

For a list of common formulas you can use, please see the following page from the official Microsoft site:

<http://office.microsoft.com/en-us/windows-sharepoint-services-help/examples-of-common-formulas-HA001160947.aspx>

## Column types that can and cannot be used with calculated columns

Not all column types can be used with calculated columns. For example, columns with multiple lines of text or choice checkboxes will not work. Following is a helpful blog discussing what column types you can and cannot use when creating a calculated column formula:

<http://techtrainingnotes.blogspot.com/2012/01/sharepoint-not-all-column-types-can-be.html>

## 6. Working with Views

For a list or library, you can decide to show or hide columns and present them in the order you want by creating a “View”. There are different view formats you can select such as Gantt chart, Datasheet or calendar, but the type of view you will likely work with the most is the “Standard” view, which displays your list or library in the same format that is used for lists and libraries in SharePoint by default.

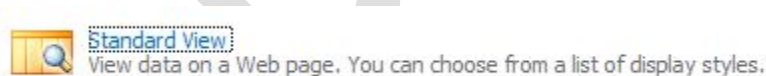
### 6.1 Create a View

You can create a view for a list (or library) and show or hide columns for that list (or library) in your new view.

1. From the List (or Library) tab, select “Create View.”



2. From the Create View page that appears, select “Standard View.”



3. In the form that appears, name your view and select whether you want the view to be personal (for only you to see) or public.

A screenshot of the 'View Name' form. It has a label 'View Name:' followed by a text input field containing 'Test view'. Below the input field is a checkbox labeled 'Make this the default view' with the subtext '(Applies to public views only)'.

4. In the “Columns” field, enable checkboxes next to each column you want to display (or uncheck the columns you want to hide.)
5. Order the columns by selecting a number next to each column name.

| Display                             | Column Name                           | Position from Left |
|-------------------------------------|---------------------------------------|--------------------|
| <input checked="" type="checkbox"/> | Attachments                           | 1                  |
| <input checked="" type="checkbox"/> | Title (linked to item with edit menu) | 2                  |
| <input checked="" type="checkbox"/> | Category                              | 3                  |
| <input checked="" type="checkbox"/> | Requestor                             | 4                  |
| <input checked="" type="checkbox"/> | Request                               | 5                  |
| <input checked="" type="checkbox"/> | Status                                | 6                  |
| <input checked="" type="checkbox"/> | Request Method                        | 7                  |
| <input checked="" type="checkbox"/> | Action(s) taken/notes                 | 8                  |

6. You can filter your columns by entering conditional statements in the Filter field.

#### Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

☒ Show all items in this view

☐ Show items only when the following is true:

Show the items when column  
 None  
 is equal to

☐ And ☒ Or

When column  
 None  
 is equal to

7. You can Group your list by choosing either one or two columns to group your list by in the “Group by” field.

#### Group By

Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in. [Learn about grouping items.](#)

First group by the column:
 

None
 

☒ Show groups in ascending order (A, B, C, or 1, 2, 3)
 ☐ Show groups in descending order (C, B, A, or 3, 2, 1)

Then group by the column:
 

None
 

☒ Show groups in ascending order (A, B, C, or 1, 2, 3)
 ☐ Show groups in descending order (C, B, A, or 3, 2, 1)

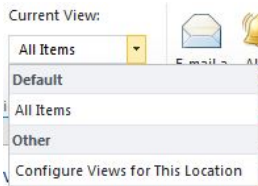
By default, show groupings:
 

☒ Collapsed ☐ Expanded

Number of groups to display per page:
 

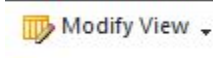
30

8. Click “OK” to save your view.
9. You can select your “view” from the list tab dropdown menu under “Current View” to display the view of your list.



## 6.2 Modify an existing view

1. From the List (or Library) tab, select “Modify View.”



2. In the Edit View form that appears, make updates such as changing the order of columns, adding “group by”, “filter” or “Sort” criteria.

**Basic**

Type a name for this view of the document library. Make the name descriptive, such as “Sorted by Author”, so that site visitors will know what to expect when they click the link.

**Columns**

Select or clear the check boxes next to each column you want to show or hide in the view of this page. To specify the order of the columns, select a number in the **Position from Left** column.

**Sort**

Select up to two columns to determine the order in which the items in the view are displayed. [Learn about sorting items.](#)

**Filter**

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Field] <[Op]> [Value]** in the column below. Use standard columns in the first column in order to speed up your view. (There are performance implications for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#))

**Index Editing**

**Tabular View**

Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in. [Learn about grouping items.](#)

**Mobile**

Adjust mobile settings for this view.

**View Name**

All Documents  
 Use address of this view: [View document that groups documents having DocumentFormat Address](#)

The view appears to display when visitors follow a link to this document library. If you want to delete this view, first make another view the default.

| Display                             | Column Name                 | Position from Left |
|-------------------------------------|-----------------------------|--------------------|
| <input checked="" type="checkbox"/> | Item's Type                 | 1                  |
| <input checked="" type="checkbox"/> | Type (can link to document) | 2                  |
| <input checked="" type="checkbox"/> | Name (can link to document) | 3                  |
| <input checked="" type="checkbox"/> | Category                    | 4                  |
| <input type="checkbox"/>            | Check in Comment            | 5                  |
| <input type="checkbox"/>            | Checked Out To              | 6                  |
| <input type="checkbox"/>            | Content Type                | 7                  |
| <input type="checkbox"/>            | Copy Source                 | 8                  |
| <input type="checkbox"/>            | Created                     | 9                  |
| <input type="checkbox"/>            | Created By                  | 10                 |
| <input type="checkbox"/>            | Edit (link to edit item)    | 11                 |
| <input type="checkbox"/>            | File Size                   | 12                 |
| <input type="checkbox"/>            | Folder (link to folder)     | 13                 |
| <input type="checkbox"/>            | ID                          | 14                 |
| <input type="checkbox"/>            | Item's ID                   | 15                 |
| <input type="checkbox"/>            | Modified                    | 16                 |
| <input type="checkbox"/>            | Modified By                 | 17                 |
| <input type="checkbox"/>            | Name (for use in forms)     | 18                 |
| <input type="checkbox"/>            | Name (linked to document)   | 19                 |
| <input type="checkbox"/>            | Title                       | 20                 |
| <input type="checkbox"/>            | URL                         | 21                 |
| <input type="checkbox"/>            | Version                     | 22                 |

**Sort by the column:** Name (for use in forms) [v]  
☒ Show items in ascending order (A, B, C, M, P, S, Z, 0)  
☐ Show items in descending order (Z, B, A, M, P, S, 0)

**Then sort by the column:** None  
☒ Show items in ascending order (A, B, C, M, P, S, Z, 0)  
☐ Show items in descending order (Z, B, A, M, P, S, 0)  
☐ Sort only by specified criteria (checkboxes may not appear before items)

**Filter**  
☒ Show all items in this view  
☐ Show items only when the following is true  
 Show the items when columns:  
 Name [v]  
 is equal to [v]  
☐ And ☒ Or  
 When columns:  
 Name [v]  
 is equal to [v]

**Group by the column:** Category [v]  
☒ Show groups in ascending order (A, B, C, M, P, S, Z, 0)  
☐ Show groups in descending order (Z, B, A, M, P, S, 0, 1)  
☐ Show groups in descending order (Z, B, A, M, P, S, 0, 1)

**By default, show groups:**  
☒ Collapse ☐ Expand  
 Number of groups to display per page: 20

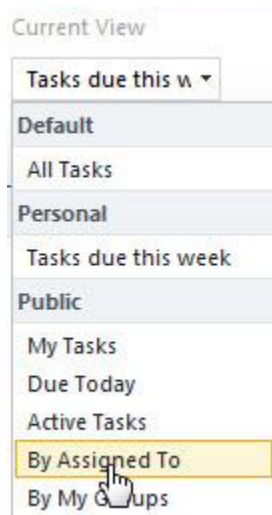
**Mobile**  
☒ Enable this view for mobile access (applies to public views only)  
☐ Hide this view from the default view for mobile access (applies to public views only)  
 Number of items to display in list view web part for this view: 2  
 Fast to display in mobile web part view:  
 Name (linked to document with add menu) [v]  
 Use address for this mobile view:  
 View document that groups documents having DocumentFormat Address  
 Show document that groups documents having DocumentFormat Address  
 Show document that groups documents having DocumentFormat Address

OK Cancel

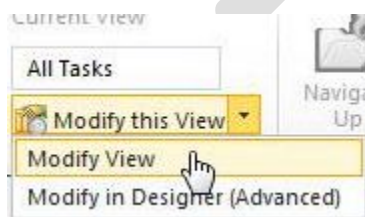
3. Click “OK” to save your changes.  
Your view will now be updated to reflect your changes.

## 6.3 Delete a View

1. From the List (or Library) tab, select the view you want to delete from the “Current View” drop-down list.



2. Select “Modify this View.”



3. In the top area of the form that appears, click “Delete.”
4. Click “OK” to accept and delete the view.



**Tip:** For more information regarding views, please see the following official procedures from Microsoft: <http://office.microsoft.com/en-us/sharepoint-server-help/create-modify-or-delete-a-view-HA010377693.aspx>